Trainer's notes for module 3:   
Personal action planning

Good practice in research data management

# Session Details

## Aims and Objectives / Learning Outcomes

By the end of this module participants will have:

* Taken an action-oriented approach to RDM planning checklists
* Considered a 20 point checklist for the Newcastle University researcher

## Session Topics

* Research Data Management planning checklists
* A checklist for the Newcastle University researcher

## Structure

This module is planned to be delivered via one session lasting around 45 minutes with a group of 12-20 attendees. The expectation is that these are postgraduate students and/or early career academics.

### Indicative timings

|  |  |
| --- | --- |
| Activity 1: Personal actions  Research Data Management planning checklists | 10 minutes  8 minutes |
| A 20 point checklist for the Newcastle University researcher  Activity: Personal action planning | 5 minutes  20 minutes |
| Session review | 2 minutes |
|  | 45 minutes total |

## Set-up

Slides are provided as detailed in the "notes to accompany slidedeck". Note the use of hidden slides by default for optional activities and slides offering further detail on a topic. (Hiding/unhiding slides is best done in 'slide sorter' view; select slides, right-click and toggle 'hide slide')

Activities are indicative rather than prescriptive. The assumption is that you are used to tailoring training outlines to meet your own needs, space and available resources! (Post-it notes, pens, flipcharts etc.)

# Notes to accompany Slidedeck for module 3

## Research Data Management planning checklists (slides 3-8)

Activity: Personal actions (10 minutes)

### Start the session with an activity, asking attendees to take stock and define their readiness to create a RDM plan. Ask them to consider:

* Where are you now?
* Where do you want to be?
* How can you get there?
* What action will you take?

These questions are typical of an action planning approach, which asks people to define a current state and a desired future state, before considering the actions required to bridge the gap. (It's a cyclical process also, which should be repeated to redefine goals and assess progress against actions.)

Ask attendees to consider the questions individually for 3-5 minutes, before forming pairs to discuss responses.

A feedback session is optional for this activity; however note that attendees will return to their responses in a following activity.

### Slide 6: RDM planning checklists

Introduce the existence and availability of a range of RDM planning checklists. Mention how considering a checklist is an excellent precursor to completing a Research Data Management Plan.

Two example checklists are shown on the next slide.

### Slides 7: 2 examples

Two examples from two significant HEIs:

University of Oxford  
<http://www.admin.ox.ac.uk/rdm/dmp/checklist/>

MIT  
<http://libraries.mit.edu/guides/subjects/data-management/checklist.html>

Click through to the resources and describe a few of the topics covered, as time allows.

### Slides 8: Defining actions

Working through a RDM planning checklist helps acts as an aid for the team members who have to produce data management plans for submission to funders, and their subsequent development once funding has been awarded.

Actions and timescales should be listed against named individuals in the plan. The checklist can help you to decide who should be responsible for what.

## A 20 point checklist for the Newcastle University researcher (slides 9-13)

### Slides 10-13: Ncl Checklist

These four slides show an outline 20 point checklist for the Newcastle University researcher. They aren't ideal to go through in presentation style; instead chose a few items to exemplify, selecting from the following:

1. What type of data are you producing? Will the data be reproducible?
   * *Knowing exactly what kind of data you have will inform many decisions you need to make about storage, backups and more.*
2. What would happen if the data got lost or became unusable later?
   * *Whether this would be a disaster or not may help you decide about it’s long term preservation*
3. How much data will there be, and how quickly will the amount of it grow?
   * *Remember, what amounts to enough storage this year may not be sufficient for next year.*
4. How often will the data change?
   * *Keeping track of rapidly changing data sets can be a challenge, you’ll need a strategy*
5. Who will be the audience for the data, now, and in the long run?
   * *This should help you judge how to structure the data and where to store, publish and distribute it*
6. Who controls the data (principal investigator, student, funder, ISS)?
   * *People need to know if they have a responsibility to the data*
7. Who in your research group will be responsible for your data management plan and keeping it up to date throughout the project?
   * *People need to know if they have a responsibility to adhere to the data management plan*
8. Who will check that you are following your data management plan?
   * *This could be down to you, or your funder, PG Supervisor or the University RES may be checking plans in future*
9. How long should the data be retained? (5 years, up to 10 years, permanently)
   * *Not all data needs to be retained indefinitely, deciding as soon as possible can save time and money*
10. What file formats will you use? Are they long-lived? What are the best formats for data creation and sharing?
    * *The file format in which you keep your data is a primary factor in being able to use the data in future*
11. Are tools or software needed to create, process, or visualise the data?
    * *This will affect the file format, you may also have to mention this in your metadata*
12. Are there any special privacy or security requirements? (personal data, high-security data); When should you not share your data or what data can’t you share?
    * *When publishing data, it is vital to consider the rights and responsibilities you have with regard to issues of confidentiality and intellectual property.*
13. Are there any sharing/ long term deposit requirements? (i.e. funder mandated repository)
14. Are there any other funder requirements you need to take account of? (i.e. data management plan in proposal)
15. Is there good project and data documentation, including adequate metadata?
    * *Remember that consistent metadata allows your data to be accessed and discovered in future*
16. What directory and file naming convention will you use?
    * *Be consistent for all your data sets, it will make it easier for you and others to use and re-use your data*
17. What project and data identifiers will be assigned?
    * *To share or cite your data your data sets should be where other people can access them, and they should have identifiers that can be referenced easily (see* [*http://www.dcc.ac.uk/resources/how-guides/cite-datasets*](http://www.dcc.ac.uk/resources/how-guides/cite-datasets) *)*
18. Is there a subject specific standard or other standard for data sharing/integration you should be using?
    * *Integration means data can be retrieved and added to other datasets to create greater, more robust and useful datasets.*
19. Do you have a storage and backup strategy?
    * *Basic advice is to make 3 copies (i.e. original + external/local + external/remote)*
    * *Have the copies geographically distributed*
    * *And don’t trust disposable media like CDs*
20. When will you publish it and where?
    * *Depositing your data in an archive and citing your dataset in your publications will facilitate its discovery and preservation in future*

Activity: Personal action planning

This is the key part of the session, a long (in the context of the session) activity to allow for reflection and planning.

You will need enough printed copies of the handout (05 Handout personal action planning activity.docx), one for each attendee.

1. Distribute the handouts and encourage participants to spend 5 minutes considering the 20points individually, referring back to what they'd stated in activity 1.
   * Ask them to tick how the points they're confident that they can respond to. (Note: it's ok to have a low number at this stage! Encourage attendees to return to this checklist at the end of module 5 – can they tick off a higher number of points?)
2. After 5 minutes, ask them to form groups of 4 to compare responses.

After a further 5 minutes, ask everyone to define 3 actions they commit to undertaking after this session.

For the final 5 minutes, bring the whole group back together, asking them to share a few of their defined actions.

## Session review (slides 16-18)

### Slide 17: In summary

This is a round up slide, with one summary point for each of the topics covered – you may wish to edit to align with your particular emphasis.

### Slide 18: Acknowledgements

Cited here are acknowledgements for resources used to create this module.

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